MFTE Guidance and Study: Advisory Committee

MEETING 1: INTRODUCTION

Mary Reinbold, AICP
SENIOR PLANNER

FEBRUARY 15, 2022
Welcome and Introductions
<table>
<thead>
<tr>
<th>Time</th>
<th>Content</th>
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<tbody>
<tr>
<td>3:00–3:15</td>
<td>Welcome and Introductions</td>
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<tr>
<td>3:15–3:35</td>
<td>Presentation: Project Workplan and Engagement Strategy</td>
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<tr>
<td></td>
<td>(project overview, protocols, deliverables, interviews)</td>
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<tr>
<td>3:35–4:00</td>
<td>Discussion</td>
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<td>4:00–4:15</td>
<td>Break</td>
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<td>4:15–4:30</td>
<td>Presentation: MFTE Workbook Outline</td>
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<td>(document structure, development, topics for best practices, data needs)</td>
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<tr>
<td>4:30–4:50</td>
<td>Discussion: Outline and City data</td>
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<td>(availability of data, approaches to transferred data, other sources)</td>
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<td>4:50–5:00</td>
<td>Action Items and Next Steps</td>
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<td>5:00</td>
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Introductions

- **Participants:**
  - Advisory Committee (order in the participant list)
  - Commerce staff
  - Consulting team (BERK)
Project Workplan and Engagement Strategy
Project Overview

• The overall goals of the project are to:
  • measure and understand impacts of the MFTE program on housing production
  • provide guidance on program design and implementation
  • make recommendations to increase the public benefit of the program

• Project period:
  • January 3, 2022–June 30, 2023
  • **Interim milestone:** June 30, 2022
Team and Advisory Committee Protocols

- **Overall protocols for the project:**
  - Point of contact (Mary Reinhold, COM)
  - Email protocol
  - Accessible documents policy
  - “Plain talk” standards
  - File sharing
Team and Advisory Committee Protocols

• Advisory Committee protocols:
  • Standing meetings: third Tuesday of the month through 2022
  • All agendas and meeting materials provided 1–2 weeks in advance
  • Agendas will include:
    • Meeting details and administrative information.
    • A summary of the planned meeting content.
    • Feedback and action items for the committee during and after the meeting.
    • Suggested questions to guide your preparation for the meeting.
    • A high-level schedule for the meeting, including major topic areas
Team and Advisory Committee Protocols

• **Advisory Committee meetings:**
  • There are many people in this room!
  • We are open to having everyone provide feedback and input:
    • Talking during the meeting
    • Entering questions into the chat
    • Email after the meeting (to Mary)
  • Automatic meeting transcripts
Team and Advisory Committee Protocols

- Advisory Committee meetings (continued):
  - Timeliness of meetings
  - Focus on the big picture
  - Continuity
  - Respect
  - Specific, actionable requests
  - Representing the views of the Committee
  - Respect decisions reached by Commerce
Project Deliverables

• Deliverables included in the scope:
  • MFTE Administration Workbook which highlights best practices and provides sample forms, worksheets, and tools for consistent statewide implementation.
  • A legislative report that reviews current practices with MFTE programs and provides recommendations for change. (Includes six case studies.)
  • Individual reports to Commerce detailing potential improvements to reporting and auditing.
  • Two webinars intended to brief stakeholders the findings and recommendations from these materials.
## Project Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Deliverable</th>
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<tbody>
<tr>
<td>January 28, 2022</td>
<td>Project Workplan and Engagement Plan</td>
</tr>
<tr>
<td>May 31</td>
<td>Draft MFTE Workbook</td>
</tr>
<tr>
<td>June 17</td>
<td>Final MFTE Workbook</td>
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<tr>
<td>September 30</td>
<td>Training Webinar 1&lt;br&gt;Draft Report: Auditing</td>
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<tr>
<td>November 30</td>
<td>Draft Legislative Report</td>
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<tr>
<td>December 31</td>
<td>Draft Report: Reporting Program</td>
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<tr>
<td>March 31, 2023</td>
<td>Final Legislative Report</td>
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<td>April 30</td>
<td>Final Report: Reporting Program</td>
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<tr>
<td>June 17</td>
<td>Training Webinar 2</td>
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<tr>
<td>June 30</td>
<td>Final Report: Auditing</td>
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## Advisory Committee Schedule

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<tr>
<th>Date</th>
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<tr>
<td>February 15, 2022</td>
<td>Meeting 1: Introduction.</td>
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<tr>
<td>March 15</td>
<td>Meeting 2: Initial results from city interviews.</td>
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<tr>
<td>April 19</td>
<td>Meeting 3: Additional interview results and pro forma model.</td>
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<tr>
<td>May 17</td>
<td>Meeting 4: Draft MFTE Workbook presentation.</td>
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<td>May 28</td>
<td>Meeting 5: MFTE Workbook discussion 1.</td>
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<tr>
<td>June 17</td>
<td>Meeting 6: MFTE Workbook discussion 2.</td>
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<td>September 20</td>
<td>Meeting 7: Case Studies.</td>
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<tr>
<td>October 18</td>
<td>Meeting 8: Additional reports.</td>
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<tr>
<td>November 15</td>
<td>Meeting 9: Draft Legislative Report presentation.</td>
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Engagement

Engagement activities for this project are expected to involve the following:

• Coordination with an **Advisory Committee** for advice and feedback.
• A set of **surveys and interviews** to solicit insights on MFTE best practices, the current state of implementation with cities, and potential areas for change.
• More detailed discussions with representatives from six cities to be used as **case studies** for the legislative report.
• Communication of the project results with **two training webinars**.
• Additional communication through **conference and workshop presentations** to relevant organizations.
A series of interviews will be coordinated with the following general groups:

- Local governments (cities and counties)
- Affordable housing organizations
- Multifamily / mixed-use developers
- Multifamily / mixed-use property owners
- MFTE unit tenants / single-unit owners
- County tax assessors
- Other organizations as required
Interviews

• These interviews will be coordinated in three phases:
  • For the first phase (early/mid February), initial interviews will be coordinated with cities represented on the Advisory Committee, in part to provide feedback on the survey instrument.
  • In the second phase, interviewees will be identified from a high-level survey submitted by Commerce. A stratified sample of respondents will be used to ensure a reasonable cross-section of results.
  • The third phase (late March) will include non-city participants, such as housing agencies/developers, tenants, county assessors, and other organizations as required.
Interviews

General protocols:

- No more than 45 minutes long.
- Scripts for the interviews reviewed with Commerce.
- All meetings will be via Teams/Zoom, with transcription.
- Transcripts made available after the interview.
- Other interviews by non-city participants may be coordinated as small group discussions, especially if it is likely that similar responses will be presented (e.g., tax assessors).
Guiding Questions:

• Are there any concerns about the schedule and timelines for the project?
• Is this a good level of coordination with the Advisory Committee?
• Are there any important considerations to keep in mind for Advisory Committee meetings going forward?
• What help can we get with coordinating interviews in the second and third stages?
BREAK
Overview

The MFTE Workbook is intended to be a resource for municipal administrators when coordinating these programs:

- Understanding the overall need for an MFTE program
- Outlining the information and analysis needed for program development and revisions
- Determining the parameters for the program
- Implementing the program (code updates and processes)
- Coordinating ongoing monitoring and future review/revision
Considerations

• The MFTE Workbook should be:
  • Easy to use
  • Written in plain language
  • Accessible to all
  • Developed with a clear structure (life cycle of the MFTE/program)
  • Able to be used for different applications (e.g., creating a new program, updating an existing program)
  • Applicable to different types of jurisdictions
  • Usable as a resource for administrators to engage with other stakeholders (e.g., Council, developers, etc.)
Executive Summary

Front matter

1: Introduction

- What is MFTE?
- What is the purpose of this document?
- What is the intended audience
- How is this document structured?
• 2: Overview of the Program
  • What is the basis for the MFTE?
  • Who is eligible?
  • What are the required parameters, and what options do jurisdictions have with the program?
  • What reporting and auditing processes are necessary?
  • Are there areas of good practice beyond the statutory requirements?
3: Developing a Program

- What are the policy expectations and goals?
- What are the opinions of major stakeholders and the public at large?
- What are current market conditions relevant to the MFTE?
- What would be the fiscal impacts to the jurisdiction?
- What program parameters can be selected?
  (targeted areas, affordability AMI/set aside requirements, other parameters)
- Which should be selected to meet policy goals?
- What other processes are necessary for the jurisdiction to develop?
Document Outline

• 4: Writing the Code
  • How do you translate the intended policy into code language for the jurisdiction?

• 5: Administering the Program
  • How do you review and approve applications for the program?
  • What are situations where an exemption would be denied?
  • How should contract provisions be managed?
  • How do you manage recertification to confirm affordability?
  • How do you coordinate closing or renewing exemptions?
6: Monitoring the Program

- What are the necessary processes for reporting to Commerce?
- What are other best practices for regular auditing and review?

7: Reviewing and Updating the Program

- How do you determine if an MFTE program has been effective?
- How do you determine what changes are necessary? What steps from the initial evaluation are applicable?
- What steps can be used to implement changes in the program?
Appendices

- Acronyms
- Engagement results ("What We Heard")
- Model code / resolutions
- Sample forms and documents
- Any other supporting information (e.g., one-page informational handouts, etc.)
Data Needs

We intend to obtain information on best practices from different sources:

- Interviews (as previously discussed)
- Existing reports
- Comparative review of programs/code
- Review of processes and supporting materials (e.g., forms, reporting formats, etc.)
- Modeling of fiscal assessment / development feasibility
Data Needs

• We need your help with compiling additional information:
  • City-level reports on MFTE programs
  • Application forms
  • Forms and documentation used internally for program support
  • Additional sources of data

• What sources do you have available? What can you share?
Action Items and Next Steps
Action Items and Next Steps

Project Team:
- Coordinate the first round of interviews
- Review results from first round and coordinate the second round
- Continue a review of available data sources

Advisory Committee
- Provide any other available information on MFTE programs
- Support first and second rounds of interviews
- Prepare for March 15th meeting
Action Items and Next Steps

Next meeting: March 15

• Next agenda/package of materials sent no later than March 8th
• Initial results from interviews
• Major findings of interest will be presented and discussed
• Additional research will be reviewed for inclusion into the document
Final Questions?